

Utah Tourism Conference 2009
The German Speaking Market



presented by **Get It Across Marketing & PR**



Major Cities





Germany has the fifth largest Economy in the World (Source: VUSA Germany)

- **GNP:** 2.5 Trillion € (2008) (Source: German Department for Foreign Affairs)
1 Euro = 1.34 USD GNP = USD 3.38 Trillion
- **GDP/ citizen:** 30,310 € (GDP Growth: 1.3%) (2008) (Source: German Department for Foreign Affairs)
1 Euro = 1.34 USD GDP per citizen = USD 40,615
- Average Income:** EUR 27,008 (or USD 36,191 with an exchange rate of 1:1.34) (Source: Advantor Ltd.)
- Economic Growth:** 2.5% growth in 2007 (Source: German Federal Statistical Office)
1.3% growth in 2008 (Source: German Federal Statistical Office)
- Unemployment rate:** 8.4% (March, 2008) (Source: statista GmbH)
8.6% (March, 2009) (Source: statista GmbH)
- **Labor force:** 40.8 million (4th quarter of 2008) (Source: German Federal Statistical Office)



Education: re-build, update and improve elementary and secondary schools

National Infrastructure: rebuild and improve highways, waterways, and rail system

State Infrastructure: rebuild and improve hospitals, local roads

Scrapping Incentive: EUR 2,500 for 10 year old + automobiles for a new car

Research & Development in Mid size Businesses under 1,000 workers

Additional State Investments: loans and guarantees provided by the 16 state governments, supplemented by the Federal government



- German population: 82.2 million people (2008) (Source: German Department for Foreign Affairs)
Highest population among all EU countries
- Size of Country: 357,104 sq km; slightly smaller than Montana (Source: German Department for Foreign Affairs)
- Paid / Bank Holidays: between 8-11 paid / bank holidays
- Vacation Allocation: between 25-30 days of paid vacation per worker
- Vacation Times: There are 12 weeks of school holidays
- Exchange Rate: 1 Euro = 1.34 USD as of April 2009 (Source: ARIVA.DE AG)
- USA Expenditure per person: USD 2,367 per Person (for 20 days) (Source: VUSA Germany)
- Length of Stay in the U.S.: 20 days (Source: VUSA Germany)
- Purpose of Trip: 66% Leisure & Visit Friends/Relatives
41% Business & Convention



Inbound Travel to the USA 2008:

	<u>Country of Residence</u>	<u>2008</u>	<u>2007</u>
1.	Canada	18,925,264	17,734,783
2.	Mexico	6,235,336	6,732,058
3.	United Kingdom	4,564,895	4,497,858
4.	Japan	3,249,578	3,531,489
5.	GERMANY	1,782,299	1,524,151
6.	France	1,243,942	997,506
7.	Italy	779,463	634,152
8.	Brazil	769,232	639,431
:	:	:	:
:	Switzerland	341,955	296,369

Source: OTTI 2008

Arrivals to the US From Germany: 1,782,299 (2008) -> increase of 17% (Source: OTTI/TIA)

German travel spending in 2008: 61.5 Billion Euro (growth of 1.5%) (Source: VUSA-Germany)

German spending to the US in 2008: 4.02 Billion Euro (Source: Dresdner Bank 2008)



Why does Germany remain an important feeder market and why should you invest in the German market:

- Obama is all over the news in Germany and creates a positive image of the USA
- The summer 2009 catalogues were calculated at an all time low to the Euro (1.58 USD)
- More hotel availability and regular rate reductions for German Tour Operators
- Other long haul destinations are suffering: Thailand (political), China (image), South Africa (image)

Airline Feedback:

No US Carrier has reported any discontinuation of current European routes.

Lufthansa has reduced its world-wide fleet; considerably less air-freight and fewer business travellers have affected the revenue situation of all airlines. Germany is considered the most stable of the European airline markets. There are more seats available from German point-of-sale than in the past (fewer tix sold ex USA). Inexpensive airline tickets this year.

Rental Car Feedback

Alamo reported that pre-bookings for the first 6 months are very good for USA. Upgrades are being offered as Americans are not booking SUVs and larger cars because gas is considered expensive. But gas for Germans only costs ¼ the price in the USA. Not expensive for us!



2009 to date for German Tour Operators packaging and selling USA

January 2009:

bookings for the USA were coming in strongly for German tour operators at a level equal or above January 2008

February 2009:

bookings slowed considerably.

March 2009:

bookings slowly picked up at the end of the month. Easter was in March last year.

April 2009:

many very short-term bookings; one to two weeks out for 2-3 week USA vacations is no longer uncommon. Easter was in April this year; travel agents reported a good solid month.

2008 was an excellent year for travel to the USA ex Germany. Tour operators are optimistic that by the end of the year they will have similar results - but late bookings makes planning difficult.

FITs are selling better across the board than motorcoach tours; a very difficult year for fixed departure tours and special group tours.

Promotions continue through May in order to push summer / fall 2009 business.

Winter programs were solid this year for Utah. European skiing this year was excellent - good snows in the Alps.



Growth in Utah Summer Inventory from 2005 to 2009

	FY 2009	FY 2008	FY 2007	FY 2006	FY 2005
Total # TO featuring Utah	44	38	33	26	20
Change in % to previous year	15.7%	15.2%	26.9%	30.0%	N/A
Total # of TO Products	529	452	420	360	291
Change in % to previous year	17%	7.7%	16.9%	23.7%	N/A

Growth in Utah Ski Inventory from 2005 to 2009

	Saison 2008/2009	Saison 2007/2008	Saison 2006/2007	Saison 2005/2006
Total # TO featuring Ski Utah	27	22	17	17
Change in % to previous year	23%	29%	0%	



Marketing Activities:

- Meiers Weltreisen Flyer Insert
- Neckermann Early Bird Catalogue Promotion
- FTI Catalogue Promotion (new SLC page)
- Tours Magazine Reiseplaner supplement (10,000)
- Die Zeit & Canusa Ski Trade/Press support
- Sun & Fun Trade/Press Mountainbike support
- America Journal Mailing
- GIA Sales Calls on behalf of UOT
- Additional Projects for Park City, Sunparks and Capitol Reef
- VUSA Travel Agent Event Cologne

Utah Sales Trips 2008/2009:

UOT Sales Mission in September 2008
Cities visited: Hamburg, Hannover,
Frankfurt & Munich

E-Marketing/E-Commerce:

GIA implemented an online strategy
for UOT in Germany.

FAM Tours

Golf FAM planned for late Summer 2009

In addition GIA helped to secure individual Product Manager visits
to Utah

Consumer Marketing:

GIA executed 5 consumer travel shows:

ITB Berlin, Stuttgart, Hamburg, Munich, Americana Augsburg

Direct Marketing:

- Creation of stickers for German Reiseplaner encouraging readers to sign up for the German Online Newsletter
- German Reiseplaner included as supplement in Tours Magazine (special interest / outdoor magazine); 10,000
- America Journal response mailings

Fulfillment (FY 2008 - 2009 to date):

- German Reiseplaner: 21,751

New German Speaking Utah Website & Utah Newsletter Tool & Utah Newsletter Sample



www.goutah.de
& **www.visitutah.eu**



Liebe Leser:

Herzlich willkommen zur ersten Ausgabe des Utah Newsletters. Wir hoffen, Ihnen unseren schönen und höchst abwechslungsreichen Bundesstaat im Südwesten der USA etwas näher zu bringen und Ihnen ein paar Anregungen zu geben. Weltberühmte Nationalparks, pulverschneebedeckte Skigebiete in den Rocky Mountains, weiße Sandstrände auf Anaholep Island, grüne Golfplätze inmitten rotem Felsgebirge, unzählige Tiervorräte und spannende Events: Sie werden Utah in all seinen Facetten kennen lernen. Und Sie dürfen unseren Newsletter auch mitgestalten und uns Fragen stellen. Können dazu finden Sie unter Punkt 11 und 12. Zunächst aber viel Spaß beim Lesen!

for Utah Office of Tourism

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1. Rekordschneefall in den Skigebieten



The Activities

- Creation and mailing of press releases
- Monthly clipping documentation and evaluation (since November 2006)
- Support of individual fam tours
- Planning and executing of group media fams
- ITB activities & events
- Image archive
- Response to media inquiries
- Support of desk research
- Industry contacts (tour operators, airlines)
- Preparation and stocking of press kits
- Follow up on fam tours
- Translation of brochures from UOT partners
- VUSA Media Breakfast in Munich with 35 journalists
- Writing of English abstracts for articles resulting of fam trips

Achievements

- Coordination of **6 individual Media Fams** (executed May 08- April 09) and including **print and radio**. In May and June another **5 individual Media Fams** from Germany will be executed.
- Coordination of **1 Press Fam with TV crew**
- Coordination of **2 group media fams**: „Ski Utah“ with tour operator Faszination Ski and 4 German top travel writers, and “International Super Fam” with 4 German top daily newspapers.
- Quarterly German Online Newsletter to ever-growing pool of subscribers (media, trade and consumer)
- Distribution of German-language press releases
- Generated **3,060,000 USD** ad equivalency (May 08-April 09) in print media and **3,428,000 USD** in TV.
- Ca. **1,2 Mill USD** generated due to media fams in print media



Dpa (German Press Agency): Individual Ski Utah Media Fam in March 2008:

Results November 2008 - February 2009

Article was released in

**23 daily newspapers,
2.3 Million readers,
173,000 USD. ad equivalency (print only)**

50 websites, big magazines (like Spiegel.de, 100 Mill. Visits and 604.8 Mill. Page Impressions p/month and newspapers (like Hamburger Abendblatt, 3.2 Mill. Visits and 18.7 Mill. Page Impressions p/month)



Consumer requests: Get It Across received numerous consumer requests for Ski Utah brochures, that can be tracked directly to the articles in both print and online media.

Sample for individual fam trip with RV and Mountain Bike in October 2008: Norbert Eisele-Hein, photographer and travel writer. To date: 3 major articles (234,000 USD ad equivalency), more will follow

1) Cover Story (RV tour through Utah, 6 pages) in *Tours* 52,000 readers, 65,500 USD ad equivalency

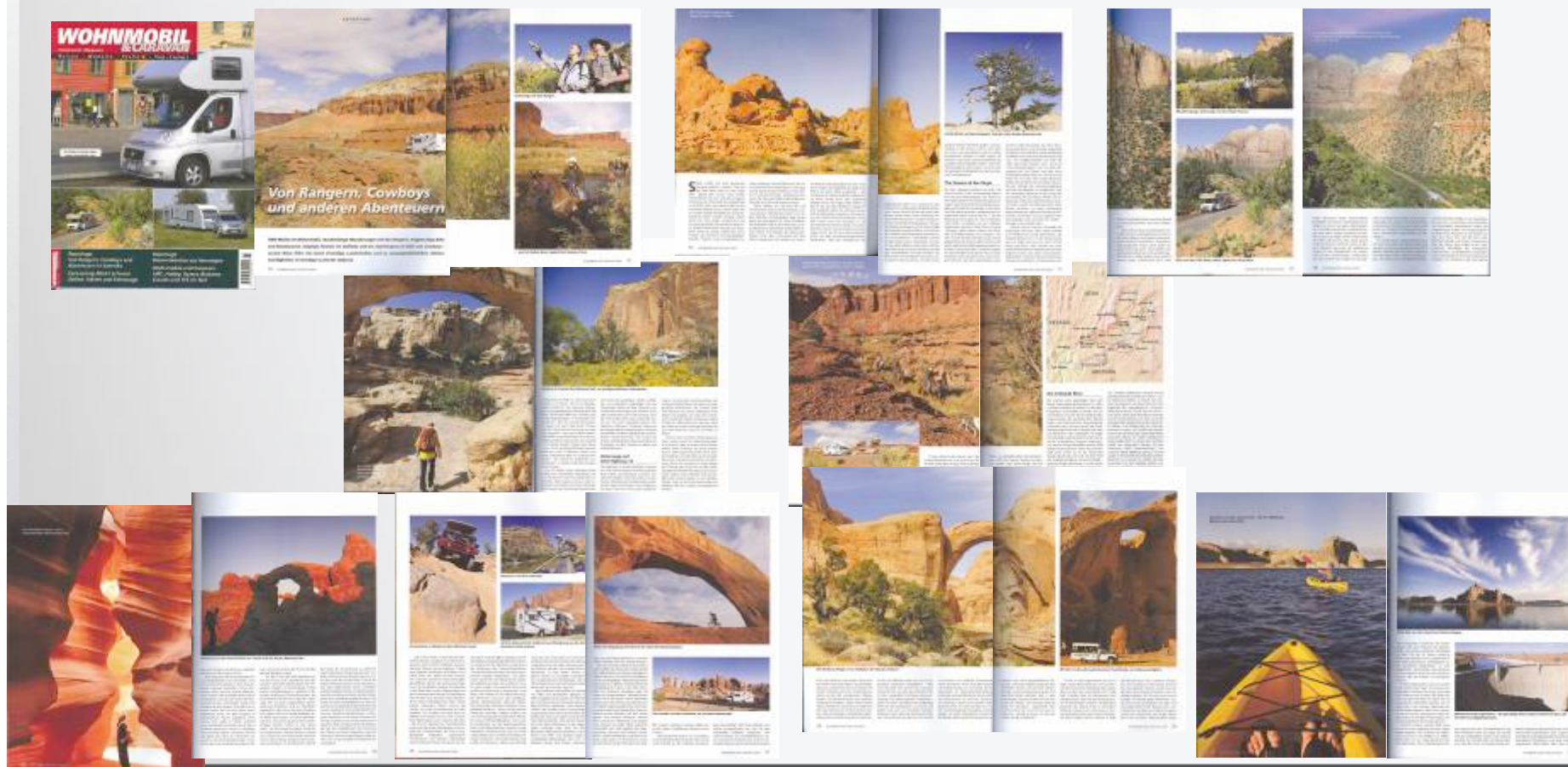


2) Cover Story (Adventure in Utah, 6 pages) in *America Journal*, 54,500 readers, 58,500 USD ad equivalency



3) Wohnmobil & Caravan, Swiss Camping Magazine. Cover picture and 20 pages (RV tour through Utah), 40,300 readers, 110,000 USD ad equivalency

More articles from this travel writers are following.



German TV Crew was in Utah in May 2008 for the film „The Dinosaur Treasure Trove - Utah's Wild South“

Film (45 minutes) was shown on ARTE TV (3 times) and ARD, and will be shown repeatedly over the next years on several different TV stations that belong to its consortium of public broadcasting institutions (10 other TV stations).

Viewers (Jan-March 09):
1,3 Million
Ad Equivalency for this film
so far: **3 Million USD**





PR Equivalency Report:

May 08 - April 09: **3,060,000 USD** in print media and **3,428,000 USD** in TV

Distributed UT Reiseplaner :

- FY 2006/2007 (Oct 2006 - August 2007) **22,176**
- FY 2007/2008 (Sept 2007 -August 2008); **22,202**
- FY 2008/2009 (Sept 2008 - to date) **21,751**

Utah's online Strategy in Germany :

First German speaking Utah Website and Utah Newsletter implemented into the market

- Newsletter 4x per year. Currently 2,100 subscribers. Start: February 2008
- Utah website goes online in June 2009

Consumer Travel Shows 2008-2009:

- 5 shows executed (including ITB) representing **29 days of consumer shows**

Growth in Utah Tour Operator Inventory 2007 vs. 2008

Utah Summer Product:

- 2007 growth 16.9%
- 2008 growth 17.0%

Utah Ski Product:

- 2007 growth 29%
- 2008 growth 23%



Travel Industry Facilitation:

- Offer special rates/ packages in off-season periods to increase motivation of tour operators to sell and feature Utah products
- Keep up TO relationships to secure business as well in shoulder seasons
- Provide inventory and allotments to TOs and receptive companies

GIA Marketing Facilitation:

- Continue UOT online Marketing strategy to consumers via website and newsletter
- Dedicate Marketing funds to show strong awareness in respective markets
- Local Suppliers to co-op with the UOT to increase coop marketing budget
- Further investment in consumer advertising or Tour Operator coops
- Support media/ trade fam tours to showcase the Utah product
- Attend international trade shows (ITB, POW WOW) and sales missions
- Supply GIA with news, press releases and brochures of your area



Even in these difficult economic times, the numbers from Germany remain stable. We should continue what we have built over the last years to keep this success growing.
So, please think Germany! Now's the time!

Thank you for your continued support!!

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